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ABSTRACT

A workbook, designed to introduce students to office occupations, this manual provides general information about office-clerical positions and outlines the education and training necessary to enter the field. Part One, "What Are Office Occupations?" contains chapters on the careers of typist, file clerk, payroll clerk, stock clerk, office machine operator, salesclerk, cashier, shipping and receiving, and mail clerk and messenger. Part Two, "What Does It Take To Be An Office-Clerical Worker?" includes chapters on education and training needed, personal qualities needed, where the jobs are, and wages and benefits. A student activities section at the end of each chapter provides various types of objective and short answer exercises on the chapter material. A 3-page quiz on the whole book is also included. (HD)

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State of New Jersey Department of Education Division of Vocational Education

INTRODUCTION TO OFFICE OCCUPATIONS

US DEPARTMENT OF HEALTH
EDUCATION & WELFARE
NATIONAL INSTITUTE OF
EDUCATION

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August 1974



DIVISION OF VOCATIONAL EDUCATION STEPHEN POLIACIK, ASSISTANT COMMISSIONER

CURRICULUM LABORATORY

RUTGERS - THE STATE UNIVERSITY

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Introduction to Office Occupations

OBJECTIVE: Know what occupations there are in the office-clerical field.

Know what duties each office-clerical worker does.

Know what education, training, and personal qualities are necessary to be employed as an office-clerical worker.

This workbook will not take the place of the training you will receive in your shop area. It will help you know what jobs there are in the office-clerical field, and a little bit about them. The book has only information that is *important* for you to know. The information is divided into sections that are easy to learn. There are questions and activities marked "Student Activities" that must be done before you go on to the next section. When you have completed a section, your teacher may give you a quiz on the information you have learned.

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Part I What are Office Occupations?

Do you want to be a "white collar" worker? If so, perhaps you can be an office cledical worker. You would help handle office records and help with the large amounts of paperwork necessary in the modern business world.

Part I of this workbook will give you general information about office-clerical positions. Part II very outline the education and training necessary to enter this field. Training in specific areas may be given in your shop. For further information you can write to:

Division of Planning and Research The Land and Labor Industry Building P.O. Box 359 Trenton, New Jersey 08625

People in office-clerical positions can work in business, government, or elsewhere. We will be working mostly with the business world. The need for all kinds of office-clerical workers becomes greater each day, as modern businesses grow larger and larger. As the amount of paper work increases, so does the need for skilled workers. There is almost no end to the kinds of jobs for office-clerical workers. These workers are very important, because their employer does not have time to do the jobs they are train a 70 do. Can you imagine the head of a large company opening all the mail that covers in filing letters, and typing his own letters? Having an office-clerical worker to do these thengs for him leaves more time for your employer to do more important jobs, like malaging the company or his section of the company.

These are some of the jobs available in the office-clerical field:



Billing clerk
Cashier
Duplicating-machine operator
File clerk
Mail clerk
Messenger
Payroll clerk
Sales clerk
Shipping and receiving clerk
Stock clerk
Tabulating-machine operator
typist



There are many other occupations also. Any of these jobs gives you many duties, such as shipping, handling money, sorting mail, operating machines, and keeping important papers in order.

TYPIST

Most businesses require typists who can turn out a large amount of neatly typed work each day. A typist operates the best-known office machine—the typewriter





Although a rypist's usual duty is typing, he is often required to perform other duties in the office. This may ude filing papers, sorting mail, and answering the telephone. A person who does these things as well as typing is called a clerk-typist.

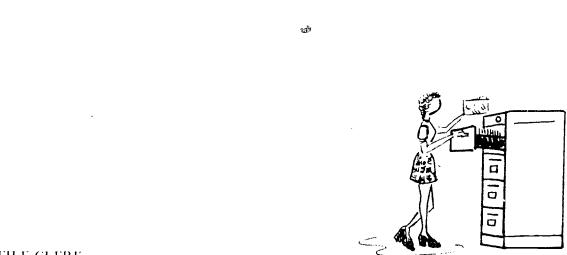
Student Activities

Answer the following questions:

- 1. What is a "white collar" worker?
- 2. Where do you think people in office-clerical positions could be hired?



- 3. What duties does an office clerical worker do so that his employer can do more important things?
- 4. List 5 office-clerical positions that you may be interested in.
- 5. What is the difference between a typist and a clerk typist?



FILE CLERK

As you may already know, businesses must keep copies of letters and important papers for possible use later on. These papers are kept in large metal cases called tiles. These papers must be arranged so that they can be found easily when needed. Several different methods of filing are used:

> Alphabetical order Filing by dates Filing by subject Numerical filing



When you are employed by a business, it is the file clerk's duty to learn the filing system being used. A file clerk not only files the papers, but also must find them in the files when they are needed by someone in the office.

Student Activities

Try truse exercises to see if you may become skilled in filing.

1. List these words alphabetically:

waiter nurse chemical operator roofer Borax Company Electric Speed Corporation A · B Dick Duplicating Xerox payroll clerk draftsman Aetna Insurance chemical operator cashier beautician automobile Borid Business Machines Jiffy Press plastic real estate salesman

2. Arrange these words by increasing numbers:

8965 Ace Movers
4545 Timex Watches
8888 Fabulash Cosmetics
1012 Bakers Chocolate
2907 Continental American
1299 Proctor and Gamble
3410 American Home
3345 RCA
4543 Life
11012 Top Brass
14332 Time and Again
654 Glass Products



3. Arrange the following by dates:

June 23, 1972
May 4, 1948
January 24, 1948
June 12, 1950
9 -10 - 45
April 22, 1973
1--6 - 34
8 - 28 - 71
2 - 4 - 44
August 27, 1971
July 12, 1968
7 - 6 - 68
February 28, 1973

4. A file clerk's job is:



PAYROLL CLERK

A company has to keep certain records to make up its payroll. A person who keeps these records is a payroll clerk.



The payrob is made up differently in different businesses. How it is done depends on the size of the company and on how the workers are paid—whether by the hour, the week, or the month. A small auto-repair business would need different records from General Motors or the Ford Company.

Look at this sample of a payroll record:

PAYROLL RECORD @lloy corp.

	REGU	LAR	OVER	TIME	GROSS				
NAME	Hours	RATE	HOURS	RATE	GROSS PAY	DEL	OUCTIO	200	NET PAY
						FED.	F, I,C.A.	175.	
				,					
					,			ļ	

The company keeps records about each employee. It must know each worker's . . .

Correct name first, last, and middle

Correct address

Number of dependents (for example, his small children)

Then the payroll clerk fills in figures on . . .

Hours worked and rate of pay

Overtime hours and pay

Deductions Federal income tax, social security (F.I.C.A.), hospital insurance, etc.

As you can see, the payroll record needs a lot of work from the payroll clerk. He must not make mistakes, or he will cost the company money, or perhaps cost a fellow worker money, and *neither* will be happy!



A payroll clerk needs to be skilled in basic math addition, subtraction, multiplication, and division. He would also need to operate an adding machine or calculator. The machine saves time and pre-ents mistakes.

Student Activities

1. Fill in the following information about these employees on the payroll record below:

Anna Wools worked 40 hours a week at \$2.00 an hour. This week she did not work overtime. She supports 3 children. Her Federal income tax deduction is \$9.56. Social Security (F.I.C.A.) deduction is \$2.22. Blue Cross and Blue Shield is \$.84.

Barnaby M. Swanson worked 40 regular hours at \$2.50 an hour. His dependents are Mafield Swanson, Herman J. Swanson, Federal income tax is \$16.45, hospital insurance i, \$2.78, and social security is \$2.30.

PAYROLL RECORD @lloy corp.

	REGULAR OVERTIME GROSS		GROSS				 		
NAME	HOURS	RATE	HOURS	RATE	PAY	DEL	UCTI	ONS	NET PAY
						FED.	F, I.C.A.	INS.	
			,						
							ļ		
						ļ			
							,		
									İ

2. Solve the following:



If you have an adding machine or a calculator, do the same problems. Write down the time you started and the time that you finished the work. Compare this to the time it took you to do it by the paper-and-pencil method.



STOCK CLERK

All types and sizes of businesses, from schools to restaurants, need at least one stockroom. A stockroom or warehouse is a storage place for goods and supplies needed in a business. For example:

Typing paper Tablecloths
Ditto masters Salt shakers
Duplicating fluid Rubber gaskets

Envelopes Oil

Nails Detergents Screws Bleach

and so on, depending on the type of business.

A stock clerk's duties are: to know what supplies are in the stockroom, to reorder supplies as they are used, to keep a record of what supplies are asked for and when the supplies are delivered. He must keep records on goods received from the receiving clerk, and must neatly store the supplies so that he can find them easily.



Student Activities

.An	swer the following questions:	
1.	A stock clerk works in a	·
2.	His duties include	
		<u> </u>
3.	List some supplies the stock clerk may have to har	ndle in the stockroom of:
	A HIGH SCHOOL	A PRINTING SHOP

A HAIRDRESSER'S SHOP

A RECORD SHOP



4.	See if you understand the different kinds of jobs we have discussed. "no" for each duty described for each job:	Answer "yes" o
	(a) Do the duties of a file clerk include -	
		Yes or No
	keeping records for figuring paychecks?	
	arranging letters and other papers in proper order?	
	checking goods received in the storeroom?	
	finding papers in the files?	
	keeping records of goods in the storage room?	
	(b) Do the duties of a payroll clerk include	
	keeping records for figuring mychecks?	
	arranging letters and other papers in proper order?	
	checking goods received in the storeroom?	
	finding papers in the files?	
	keeping records of goods in the storage room?	
	(c) Do the duties of a stock clerk include	
	keeping records for figuring paycheeks	
	arranging letters and other papers in proper order	

checking goods received in the storeroom

keeping records of goods in the storage room

finding papers in the files



OFFICE MACHINE OPERATOR

There are many jobs for office-machine operators. You will have to know how to operate several different machines. The most common are:

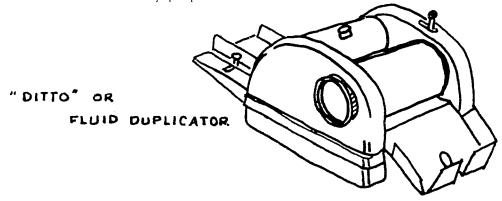


Duplicating machines Copier Addressing machine

Duplicating Machines

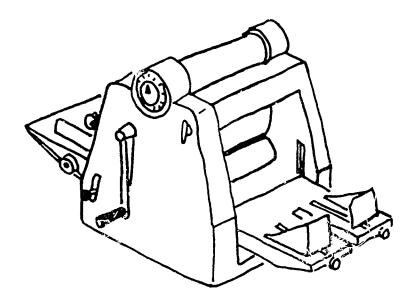
Here are two types of duplicating machines:

Ditto - A typist types the material on a *master*, which transfers the type to an inked surface. The inked surface is torn from the master, leaving a piece of paper with regular typing on the front, and inked typing on the back. This is then put, ink side up, on a machine that feeds in a clear *duplicating fluid*, and make copies of the *original* paper. The color of the copy depends on the color of the ink on the master. The color is usually purple or black.



Electronic Stencil — The paper to be copied is put on a *cylinder* in a machine that "sees" the printing or the drawing and then transfers what it sees to a *master*. The master is then put on a machine something like the ditto. However, this machine feeds in a *black ink* instead of duplicating fluid. The copies this machine makes look almost exactly like the original paper. They look as though they had been typed separately. This machine is much more expensive than the ditto.





STENCIL DUPLICATOR

Copier – A copier is used when only a few copies of something are needed. This machine takes a picture of the original paper and makes a copy on a piece of paper, all in one short time, and all inside the machine. No one has to transfer dittos to another machine or worry about getting ink or duplicating fluid on his clothes or himself. This is the most expensive way of copying.

Addressing Machine — People's names and addresses are put on metal plates (about the size of charge plates). The machine takes the plates and prints them on envelopes, magazines, packages, etc. Your job would be to see that the machine runs properly:

Plates go in properly
There is enough ink to print properly.
There is enough pressure to print clearly.
Plates change—when they are supposed to.

You may use all of these machines, some of them, or completely different machines, depending on the size or the type of business in which you are employed.



Student Activities

Answer the following questions:

- 1. Which machine might be used to run off a note to all 30 employees concerning the office Christmas party?
- 2. Which machine is the cheapest to use for duplicating?
- 3. Which machine would be used for a newsletter to be mailed out to 500 business customers?
- 4. Who is the person who takes care of all of the duplicating machines?
- 5. Which machine would be used to make 3 copies of a letter you received from your state senator, who is thanking you for your interest in pollution control?
- 6. Which machine would a company use to make 25 copies of a newspaper article just as it is in the newspaper?_____



SALESCLERK

Another kind of clerk is the salesclerk. He works in a store and sells things directly to customers. If you enjoy meeting many different people, this is the job for you! Your job would probably include the following.

Greeting the customer
Offering help
Pointing out things that would please the customer
Helping the customer make a choice
Writing up sales slips and/or working the cash register



It is very important that you make the customer feel he is welcome to your shop in your store, that he is free to make his own decisions, and that you have quality products for him to buy. This is the first step in being a good salesperson. After he has made his purchase, write up your sales ship accurately.

Sample Sales Slip

Olloy corp DALLAS, TEXAS 479011						
STORE NO.	CLERK N	O. CASH	CHG.	DA	TE	
NAME						
ADDRES	5					
CHG. NO.						
QUAN.	ITEM				PR	ICE
			-			_
		-				
					_	
			_			
			TA	X		
			тот	AL		

Check your figures yourself or on the cash register. When you wrap or bag a purchase, handle it with care. This pleases the customer, and he will be likely to come back to your store another time.

Another important thing is to remember to file the store's copy of the sales slip. The store needs to keep a record of the sales that were made. This also helps your stock clerk in *inventory*. An inventory is a count of all the goods in the store at a certain time.



Student Activities

Do the following exercises.

Mr. Barton came into the Handyman Hardware Company and purchased these items:

4 cans of red barn paint at \$5.98 a can; 2 large nylon paintbrushes at \$3.00 each; 2 aluminum ladders at \$97.67 each (extension ladders), and 2 aluminum paint hooks for \$.45 apiece

Fill in this sales slip for the items above:

		YMAN H 'INELAN		-		NY	
STORE ME	. Сц	RK NO.	САЭН	CHG.	DA	TE	41239
NAME							
ADDRES	\$						
CHG. NO.						·	
QUAN.	ITEN	1				PR	ICE
					_		
,		_		TA	x		
				TOT	AL		



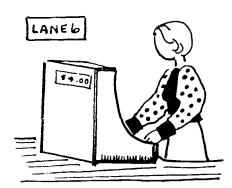
How much change would Mr. Barton get from \$300,00?

In what coins and paper money could you give this change?

 _____pennies
 _____quarters
 \$5 bills

 _____nickels
 _____half dollars
 \$10 bills

 ______dumes
 ______dollars
 \$20 bills



CASHIER

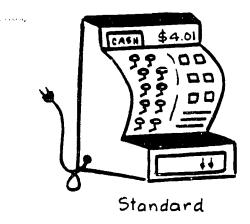
Another person who handles the cash register is a cashier. Although cashiers may be known by different names, they are the people who receive the money paid by the customer. Sometimes a cashier is also a salesclerk. Sometimes his *only* job is to receive the money. For example, there are cashiers who only receive money at grocery stores, some types of discount stores, and restaurants.

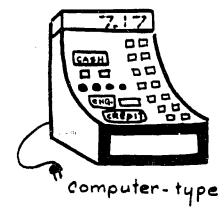
Cashiers also make change and give receipts for payments. Small stores may have eashiers who add up purchases on a sales slip, often with a small adding machine.

A cashier must always be courteous. If a customer questions the change you have given, or any other thing that has to do with your job, try to straighten out the problem quietly and with patience. If the problem is not easily solved, call your manager to help you. But remember, in any business your main thought must be to satisfy the customer so he will come back again.



THE CASH REGISTER





There are many types of cash registers, especially now in the age of computers. Most cash registers record the amounts of the purchases and then add them up. Some cash registers tell how much change to give the customer. Computer-type registers also record the *inventory number* of the purchase, so that there is always an inventory (count) of everything in stock. Many cash registers used in department stores and other businesses that accept *credit cards* are connected to computers that act like giant memories. These record special information about the customer, such as—

how much he has *charged* on his *charge account*: whether he has charged more than the total amount that he and the store have agreed upon: what payments have been made on the account.

This information helps the store keep track of the bills still not paid by customers. It also helps the customer know that he is not charging more bills than he is allowed to charge.

Student Activities

Circle T for true. F if the statement is false.

- T F 1. A person who handles the cash register is the cashier.
- T F 2. A cashier waits on customers and helps them make the proper selection.
- T F 3. A cashier can make change and give receipts.
- T F 4. If a customer doesn't think you gave him the correct change, turn away and go on to the next customer.
- T F 5. Some cash registers can record the customers name and address.
- T F 6. Some cash register can check the customer's credit.



T F 7. Having a cash register that records the inventory number helps the stock clerk.

T F 8. Many cash registers tell how much change the customer is to receive.

Add the following amounts and figure how much change should be given:

\$10.00 7.25	Give change from \$25.00	\$ 7.50 10.49 3.57 1.25	Give change from \$30.00
\$45.67 4.09 12.13	Give change from \$80,00	\$.67 .50 89	Give change from \$5.00
\$ 1.45 67.22 .54 .32 .89	Give change from \$71.00	\$7.60 4.56 4.44	Give change from \$20.00



SHIPPING AND RECEIVING CLERK

"Shipping," in business, means sending out goods to your customers. The shipping and receiving clerk keeps records of all goods shipped out and received by the business. This clerk checks outgoing shipments to see that a customer's order has been filled. He checks incoming shipments to see that his company's orders have been filled correctly and that none of the goods have been damaged. A shipping and receiving clerk must fill in the forms needed for shipping and receiving. He may have to type or write the forms. These forms may include bills, records of charges, and weight of each shipment.



MAIL CLERK AND MESSENGER

The mail clerk is the person who sorts all incoming mail and delivers it to the proper person or office. Not all businesses have a mail clerk, because these duties are sometimes handled by some office-clerical worker. However, if the mail clerk has a separate job, he must watch for special delivery letters, telegrams, and perishable packages (things that might spoil). He must also watch for damaged goods. The mail clerk may also take care of outgoing mail: he must collect it from the various offices, make sure it is sealed properly and addressed properly with a zip code, and then must put on the correct amount of postage (stamps).

In some businesses there may be a need for a messenger. This person would pick up and deliver notes, papers, and any other things that needed to be taken from one place to another inside the building. At times he may have to deliver something that cannot be sent through the mails, and so may have to drive a car or truck. The mail clerk may also be the messenger in a place where neither job has enough work to be a full-time job.



Student Activities

From this list of six jobs, fill in (the blank spaces in the 15 sentences below:
cashier shipping and receiving clerk duplicating-machine operator	saleselerk mail elerk messenger
1. A makes c	hange.
2. The	delivers messages in the office.
3. The mail clerk may also be th	ne
4. Records of goods shipped in a	ind out are kept by the
5. A	receives money from customers for goods purchased.
6. The might have.	greets the customer and answers any questions he
7. Copies of letters and papers a	re made by the
8. Mail is sorted and delivered by	the
9. Mail is collected and stamped b	ov the
10. Asent through the mails.	may be required to deliver something that cannot be
11. The	must check the condition of goods.
12. Receipts are made by the	·
13. The	must watch for special delivery letters and telegrams.





14. A _____ hélps the customer make a choice.

15. The ditto or electronic stencil would be used by the ______.

Part H What Does It Take To Be An Office-Clerical Worker?

EDUCATION AND TRAINING NEEDED

You have learned about the duties of some of the people who are employed in the office-clerical field. Perhaps you have wondered what types of training would be necessary. Of course, a good education will help you. One of the main parts of your job will be communication—understanding what people tell you, and being able to explain yourself to others. However, other skills may also be needed. Of course, a typist must be able to type, but these other things are also important for a clerical worker:

Spelling

Punctaution

Language use

Vocabulary (what words mean)

Math skills

Reading (Why? To follow written instructions!!)

Your chance to get ahead on the job will depend on whether you have a good education. You may also need special training. Some of this training can be gotten in school, but almost all beginning clerical workers receive some on-the-job training too. However, it is not wise to depend on learning your job after you have been hired. You should get as much training as possible in school. You will do better in business if you at least know about some office machines, and about office procedures (how things are done)

PERSONAL QUALITIES NEEDED

In addition to education and training, employers expect their employees to have good personal qualities. When packing employees for promotion, the employer will consider:

- ✓ Education
- ✓ Training
- ✓ Personal qualities



"Knowing that the office-clerical worker is a "white collar" worker should give you a hint as to how you should look on the job. You should pay close attention to your appearance. Your appearance depends on your health, poise (how you handle yourself), cleanliness, posture, and dress.

Good health will help you work well on the job. A person who is well poised has self-control and self-confidence. He is able to work under pressure (when things are rushed). An employer does not want an employee who lets the pressure of work make him cross and angry.

Cleanliness and nearness always make a good impression on others. An office-clerical worker should pick clothes that are suitable for the job. Matching outfits or suits are good, Jeans, too-short dresses, tee-shirts, and so on may be comfortable, but they don't look very good to your employer!

Good posture is also important to a good appearance. "Posture" means how you stand and sit. Good posture is necessary to keep the organs of your body working properly, and so it affects your health.

Which of these employees do you think is liked by the employer and others?





Besides having a good appearance, an office worker should always use correct English and pronounce words properly. Good speech habits will help you succeed. Slang and sloppy speech are not good in business. Your voice should be pleasant to those who are listening. Do not talk too loud or too soft.

Getting along with others is very, very important. You must be cooperative, dependable, loyal, courteous, and tactful. You may handle important papers that must not be talked about with anyone else. You may hear gossip. Do not pass it along. Be courteous, greet others—— it doesn't cost you a cent! When someone makes a mistake, talk too him: don't bave him find out that you said bad things about him to someone else. Be kind, be tactful in telling him where he went wrong.

REMEMBER:

If you want a job as an office-clerical worker, you must have a good education and good personal qualities. These qualities will show in your appearance, speech habits, and the way you get along with others.

WHERE THE JOBS ARE:

The choice is wide. There are office jobs all over the country. The biggest single employer of people in the office-clerical field is the United States Government. There are not many other fields where the need for workers is so great. If you are trained, it will be easier to find a job. Businesses of every size and type employ office-clerical workers:

banks government agencies

manufacturing firms hospitals insurance companies schools

money-lending companies large restaurants

stores unions

and many other places.

When applying for a job with the local, State, or Federal government, your office skills are important, but you also have to pass an important examination. A good general education will prepare you for this examination—the civil service examination.



A good starting salary is not the only thing to consider when looking for a job. Health insurance, vacations, sick leave, pensions, and other *fringe benefits* are also important.

The working hours for most persons in the office-clerical field are from about 35 to 40 hours. Your hours depend upon where you work. Salaries differ in different parts of the country, and your salary will also depend upon your own skills. The salary of a clerical worker can be about \$70 or more a week. Good workers are likely to get promoted and get more pay.

Besides salary, workers get what are called fringe benefits. For example, most clerical workers receive at least a one-week paid vacation a year, plus six paid holidays. However, after several years of work, longer paid vacations may be given. In addition to paid holidays, most companies offer benefits such as life insurance, hospitalization, pension plans, and sick leave.



Short Quiz on Parts I and II

record-keeping are called			workers.
2. Some examples of these workers a	are:		
	<u> </u>		
3. Which of these are office-clerical	jobs? Put a	che	ck in front of all the ones that are.
manufacturing business for preparing business forms making copies of important installing telephones meeting callers courteously making change putting foods in boxes sorting mail delivering messages within 4. Match the correct job with the lin.)	t papers		•
(a) salesclerk (b) stockclerk	<u>b</u>	1.	Keeps accurate records of mer- chandise in stock.
(c) shipping and receiving clerk (d) office-machine operator		2.	Answers questions and points out things that would please the customer
(e) messenger (f) cashier		3.	Receives money paid by customers for goods and services.
(g) file clerk		4.	Delivers messages.
(h) mail clerk		5.	Arranges and stores business papers in a systematic and orderly manner.
		6.	Sorts mail and watches for special deliveries.
		7.	Maintains records of outgoing and incoming shipments.



	Good personal appearance
	Getting along with others Training for the job
	None of these
1	6. Arranging and keeping business papers in large cases in a neat and orderly way is called
•	7. Office-clerical workers who want a job with the Federal Government must pass a examination.
8	3. An office-elerical worker will probably be able to do his job if he has
(D. List some businesses where clerical workers can be employed:
10	. Clerical workers usually work from to hours.
	. Clerical workers usually work fromtohours. . An office-elerical worker should know: (check one or more)
	
	. An office-clerical worker should know: (check one or more)
	. An office-elerical worker should know: (check one or more) history
	. An office-clerical worker should know: (check one or more) historyspelling



	heck which of these show a go	
	poor speech	suitable clothing
	good health	loyalty
	poor posture	clean clothes
14. A	person who gets along with	fellow workers is: (check as many as are correct.)
	dependable	
_	gossipy	
_	cooperative	
_	loyal	
15. Te	show that you are able to d	lo your job, you must be able to
	work at your own speed	1
	do good work with som	
_	finish ahead of the othe	rs
16. Lis	st some things that an emple	oyer will notice when he is hiring, and also when he is
	nking of promoting you:	•
	 	

You have now completed your introduction to office-clerical occupations. Use what you have learned here and in shop to help you decide what to try for. Remember, there are many kinds of office-clerical jobs that you can do!

